

Memorandum

Date: February 21, 2024

To: CALES Advising Team

From: Michael Staten, Associate Dean for Career and Academic Services

Subj: Report on Review of CALES Advisor Caseloads and Scope of Job Duties

Beginning in early Fall 2023, CALES Division Business Services and the Office of Career and Academic Services (CAS) began a detailed review of all CALES advisor positions, top to bottom in terms of rank, and including all positions with a UCAP advisor classification. The review began as a UCAP alignment project. It ended up also addressing concerns around possible workload disparities across positions, triggered by apparent caseload differences. Nancy Rodriguez-Lorta took the lead on data collection for this project and together we worked through various nuances in the data to address questions posed by CALES DBS.

With this memo I'm reporting back to you the key elements of what we found. I think you will find the results interesting, and a validation of the approach we've adopted in this college over most of the past decade. Simply put, we think we offer the best of two approaches: 1) department advisors housed in academic units who play specially dedicated roles for their unit so as to keep students at the forefront while also serving unit needs, and 2) centralized support by college-level advisors who are generalists who address advising issues common to all majors (e.g., orientation; academic eligibility cases, etc), at the same time providing backup for departmental advisors.

Data Upon Which Conclusions are Based

- **Advisor caseload data:** As many of you know, the University's official advisor caseload data changes constantly to reflect the number of student plans (e.g., majors, minors, certificates) assigned to those individual advisors who have dedicated student caseloads. Not all CALES advisors have assigned caseloads, which is an important point to keep in mind when thinking about scope of duties across the CALES advising network. We began closely monitoring these data last fall, but the documents we delivered to the Dean this week reflect undergraduate caseload numbers in the system as of February 9, 2024.
- **Itemization of additional job duties for each advisor:** These notes provide granular detail about the additional duties of each advisor in CALES. They result directly from Nancy's role as either dotted-line or solid-line reporting supervisor for each advisor in the college. Where appropriate, the notes also reflect input from Assistant Directors of

Advising within some of our academic units who have advising Manager job classifications according to UCAP.

- **CALES Advisor Duties survey data from February 2023:** One year ago CALES conducted a detailed survey of all advisors within the college (both unit-based and inside CAS) that gathered data on specific job duties and allocation of time during a typical work week. These self-reported survey responses (N = 25 out of 29 on the team at the time) are highly representative of the CALES advising culture and illuminate the multi-faceted nature of an advisor's work. A summary chart is attached to the end of this memo. We believe these data are sufficiently recent to be an accurate reflection of current distribution of duties and workload in February 2024, and **clearly illustrate that caseload is but one of several indicators of how advisors spend their time.**
- **The UA's Advising Self Study report from 2016:** While this report is now 8 years old, we found that it reported data and practices remarkably consistent with what we see in CALES today. A copy is attached.

Some Conclusions From Our Review:

- **Rationale for basing advisors in academic units:** CALES adopted this policy for its professional academic advisors with dedicated student caseloads (i.e., those assigned to specific majors and minors) back in 2016, the year that marked the end of the old practice of CALES academic units utilizing faculty members instead of professional advisors. As it turns out, there was plenty of precedent for this move, as the 2016 UA Self Study reminded us. A review of the Self Study report confirmed that in 2001 the UA adopted a distributed model (instead of a central advising "bureau" serving the entire campus) in order to foster cooperation and consultation with faculty in the academic departments. This policy was reviewed and reaffirmed twice in subsequent years by external reviewers (NACADA, in 2008) and by a UA Vice Provost Task Force (2010) as the most effective approach. CALES, with its diversity in academic disciplines, is a microcosm of the UA Main Campus. Our "distributed advising" philosophy within the college mirrors the UA's approach over the past two decades.
- **A wide range of duties, beyond one-on-one advising caseloads, was and is normal:** It is clear from perusing the 2016 UA Self Study Report (e.g., pp 24-26; also page 36) that duties beyond one-on-one advising with students were considered both normal and important. Responses from surveys of UA advisors conducted across campus for the 2016 Self Study showed patterns of how advisors spend their time that are similar to the patterns we discovered in our own survey of CALES advisors in February 2023.
- **Caseload is not the only metric that should be used for gauging advisor workload:** At the end of this report is a graphic that displays the results of our 2023 CALES Advisor Workload survey. To focus on caseload alone misses a large part of the point of integrating advisors directly into academic units. In 2023, 80% of CALES advisors

responded that 56% of their time during an average week was devoted to “academic advising,” defined as “Direct Student Contact (appointments, drop-ins, proactive and reactive email communication, orientation appointments and follow-up communication).” **The balance of 44% of time was spent on other types of activities not directly related to the size of their caseload**, including: “Student Support and Instruction” (newsletters, listservs, embedded teaching, workshops and events and coordination of tutoring/peer mentoring programs); “Academic Support” (Department curriculum committees, department meetings, creation or editing of department materials, development of new curriculum in conjunction with faculty, coordination or support of departmental events, awards and recognitions); “Service and Professional Development” (Participation in Agvisor and UPAC meetings, member of college or university committees or working groups, attending university-wide trainings and workshops, engagement with national professional organizations); and “Other Duties.” Of course, senior level advisors in the academic units devote substantially more of their time to supervisory and oversight duties for advisors in their units, and also to handling special or complex cases.

Our detailed review of all of these tasks for each CALES advisor left us with the impression of a fully engaged advisor workforce. Clearly, caseload drives a significant portion of an advisor’s time, and in some cases the majority of their time during a normal work week. **But, based on our review we are satisfied that there is no inverse correlation across the CALES advising team between caseload and “idle” time. In other words, smaller student caseloads for some advisors are associated with greater engagement in the other four categories of duties.** Advisors embedded in the academic units are valuable to their units in multiple ways.

- **The advent of multiple campuses and delivery channels at the UA since 2016 has introduced even greater variance in the demands on an individual advisor’s time in units that host such programs.** Online advising requires more intense contact with students because there are no physical offices to visit, nor other staff to consult. Quite literally, the advisor often becomes the face (or at least the voice) of the degree program. Prospective students, in particular, place significantly greater demands on the time of an online advisor, as compared to Main Campus advisors. In large part this is because these students have nobody else to consult about how their particular circumstances and prior credits earned will likely be transferred into the program. Experience with our two CALES online programs that have been running several years (ENVS and Nutritional Science) indicate that the optimal student/advisor ratio for effective online advising is well below 250:1. Our enormous growth in the online Nutritional Science program was especially stressful for SNSW advisors. It required a rapid “staffing up” to accommodate not only existing students, but also to try and keep the growth momentum going by handling many inquiries from prospective new students. Those advisors have been doing student recruiting for us in an even larger way than is the case for our advisors in Main Campus degree programs. This is another reason that “observed caseloads” are a deceptive metric for judging how much work these online advisors do, since prospective students aren’t counted at all in this metric.

In addition, Distance campus students also require more time due to transfer models that they follow (e.g., 2+2 models that aren't necessarily completed in 4 years total).

- **Advisors housed inside CAS do not have assigned caseloads within degree programs.** This is by design, for the reasons cited above. We want front-line advisors handling students within each degree program to be embedded in their academic units. CAS advisors, on the other hand, provide college-level support to the entire CALES advising network; coordinate new student orientation; support student events; facilitate success courses; lead our college-wide retention initiatives (including proactive student outreach), serve as backup for unit-level advisors; and coordinate academic eligibility cases. For them, assigned caseload is not a relevant metric. And, nobody could credibly argue that these advisors aren't contributing mightily to the CALES instructional mission, or are sitting around idle with "lighter" workloads than unit-level advisors.

Based on all of the above, we believe that focus on the single metric of "advisor caseload" gives an overly narrow and often misleading view of what an advisor actually does on the job.

Advisor caseload is certainly a poor metric for making judgments about workload disparities. That said, we don't mean to suggest that caseload carries no meaning whatsoever. Excessive caseloads for advisors can definitely signal that too few front-line resources are being devoted to the important one-on-one engagement that is critical for student success. But a suggestion that an advisor with a lower-than-average caseload is enjoying a lighter workload is too simplistic and most likely incorrect.

Proportion of Advisor Duties by Advising Level CALES 2023 Advisor Survey

